Wisconsin ServicePoint

AGENCY ACCESS LEVELS FOR SYSTEM USERS

Policy:
Management of user accounts and account usage

Standard:
HMIS staff, and participating agencies agree to apply the proper designation of user accounts and manage the use of these accounts by staff.

Purpose:
To enforce information access security protocols including user levels.

Resources:

HMIS WEB SITE (WISP)
https://wisconsin.servicept.com

HMIS INFOrmed
www.hmis.info/default.asp

Wisconsin HMIS
http://wisp.wi.gov

WISP HELP
sphelp@commerce.state.wi.us

Resource Specialist I – Under this access level, a user may access only the ResourcePoint module. Users may search the database of area agencies and programs and view the agency or program detail screens. Access to client or service records and other modules and screens is not given. A resource specialist cannot modify or delete data.

Resource Specialist II – Under this access level, a user may access only the ResourcePoint module. Users may search the database of area agencies and programs and view the agency or program detail screens. Access to client or service records and other modules and screens is not given. A Resource Specialist II is an agency-level "Information &Referral (I&R) specialist" who may update their own agency and program information.

Resource Specialist III – Under this access level, a user may access only the ResourcePoint module. Users may search the database of area agencies and programs and view the agency or program detail screens. Access to client or service records and other modules and screens is not given. A Resource Specialist III may edit the system-wide news feature of WISP.

Volunteer – Under this access level, a user may access ResourcePoint, and have limited access to ClientPoint, and to service records. A volunteer may view or edit basic demographic information about clients (the profile screen), but is restricted from all other screens in ClientPoint. A volunteer may also enter new clients, make referrals, or check-in/out a client from a shelter. A volunteer does not have access to the "Services Provided" tab in WISP. Normally, this access level is designed to allow a volunteer to perform basic intake steps with a new client and then refer the client to an agency staff or case manager.

Agency Staff – Under this access level, a user may access ResourcePoint, and have full access to service records, but only limited access to ClientPoint. Agency staff may access most functions in ServicePoint, however, they may only access basic demographic data on clients (profile screen). All other screens are restricted including Reports. Agency Staff can add news items to the

newswire feature of ServicePoint.

Case Manager I – Under this access level, a user may access all WISP screens and modules except "Administration." A Case Manager I may access all screens within ClientPoint except, for confidentiality reasons, the medical screen. They also may access Reports.

Case Manager II – Under this access level, a user may access all WISP screens and modules except "Administration." A Case Manager II may access all screens within ClientPoint, including the medical screen. They also may access Reports.

Agency Administrator – Under this access level, a user may access all ServicePoint screens and modules. This level may add/remove users and edit agency and program data for his/her agency.

Executive Director – same access rights as Agency Administrator, but ranked above Agency Administrator.

System Operator – Under this access level, a user may just access "Administration." The system operator can setup new agencies, add new users, reset passwords, and access other system-level options. The system operator may order additional user licenses and modify the allocation of licenses. They maintain the system, but may not access any client or service records.

System Administrator I– same access rights to client information as Agency Administrator, but not for all agencies in the system. Also has full access to administrative functions

System Administrator II– No restrictions. Full access to WISP.

	ClientPoint	Profile	Medical/ Addiction	Residential, Employment, Military/ Legal, Case Management, Case Notes and Worksheet History	ServicePoint	Referrals	Services Provided	ResourcePoint	ShelterPoint	Reports	Administration	Add/Edit Users	Reset Password	Add Agency	Edit Agency	Delete Agency	Add/ Edit/ Delete Programs
Case Manager I		x		x		x	x	x	x	x							
Case Manager II		x	x	x		x	x	x	x	x							
Agency Administrator		x	x	x		x	x	x	x	x		x	x		x		x
Executive Director		x	x	x		x	x	x	x	x		x	x		x		x
System Administrator II		x	x	x		x	x	x	x	x		x	x	x	x	x	x